



U.S. General Services Administration

# Federal Acquisition Service

## **IWAC Integration into ITSS**

*GSA Training Module for IWAC Region*

# IWAC Training Module Overview

**Description:** This training module will take you step-by-step through the order creation process in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

**Navigation:** If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

# Glossary

Term	Definition
AAS	Assisted Acquisition Services which supports Regions 1-13
Approving Official	Optional designation on BOMSOW to require a GSA official (besides the CSR) to approve the winning quote prior to client approval and/or certification of funds
BOMSOW	Bill of Materials/Statement of Work
Client Acceptance Required	Option on Market Analysis document to require client approval of GSA recommended Quote
CO	Contracting Officer
COI	Client Order Information – first document generated in an ITSS order
COM	Commodities (Task Item Type)
Commodities	An order for hardware, software, may also include installation
Contract	The government contract number that the order will use if awarded
Contractor	Employee of a private company, or industry partner. Contractors submit quotes for RFQs/RFIs, and once awarded, create support documents. Also known as a vendor.
Contractor Bid Table	An excel sheet exportable from the Market Analysis document showing information from submitted Contractor bids at the task item level
Contractor Proposed Amount	Non-editable field that is populated with the task item quote amounts from the winning contractor's quote. If the parent form on the basic order is a Directed Buy, this field is editable and required to be entered by the user as the amount agreed upon between GSA and the contractor offline.

# Glossary

Term	Definition
CSR	Customer Service Representative. GSA representative who acts as the primary liaison between the client and the contractors. CSRs are typically responsible for processing orders, with the exception of signing purchase orders.
Current Project Value	Non-editable, calculated field; this value is derived as the sum of all task item Contractor Proposed Amount values for all task items whose POP/Delivery Dates fall within the order-level POP/Delivery Date.
Delivery Date	The order-level Delivery date is the maximum Delivery Date of all active COM task items.
Directed Buy	Creating a Directed Buy on the basic mod (00) bypasses the RFQ process - a single contractor is selected on the BOMSOW to be issued the order directly.
Dollars Subform	The Dollars subform has fields for capturing costs, fees, totals, and other money-related values. The Dollars subform is displayed on the Directed Buy and Market Analysis documents.
FAST	A program type of orders that provide commodities
Faxed Quote	Quote that CSR submits on Contractor's behalf after the RFQ has been closed
FFP	Firm Fixed Price - A task in which one price covers all costs. Also a Task Item type.
FISSP	A program type of orders that provide services, generally IT.
Flat Fee	A type of GSA Fee where the client is charged a flat rate.
FM	Fund Manager
Grand Total for Incremental Funding	Non-editable field that is calculated as the sum of all New Task Item Amounts.
ITSS	IT-Solutions Shop – A component of the Regional Business Application (RBA) that provides workflow for acquisition and procurement activities.

# Glossary

Term	Definition
LAB	Labor (Task Item Type)
Market Analysis	The process of selecting a winning vendor once the RFQ has been closed. Market Analysis (MA) documents allow GSA to view quote information, select a winning vendor and calculate order amounts.
NAICS Code	North American Industry Classification System; 4-6 digit code.
Negotiated Award Date	The final date agreed upon for the order to be awarded.
New Task Item Amount	Field amount entered by GSA; Must be less than or equal to the Contractor Proposed Amount.
No Bid	Option for Contractor to notify CSR they are not participating in specified RFQ.
Order Summary	Used to list the order requirements or provide basic instructions for the vendors.
Peer Access List	Includes members of the same registered organization as the primary client, with limited access to the order.
POP From	Date the Period of Performance begins
POP To	Date the Period of Performance ends
Project (time & materials)	A task where government only pays for time spent on services and materials used
Publish in e-Buy	Option on the BOMSOW to publish the RFQ to e-Buy using e-Buy Connect
Quote	Document that Contractors submit in ITSS (or in e-Buy) to respond to an RFQ or RFI, detailing how they will meet the requirements set forth by the client. A Contract Number must be selected on every Quote.

# Glossary

Term	Definition
Quote Due Date & Time	The date and time that the bidding process ends
Quote Summary for Unregistered Contractors Region	ITSS page that is generated after RFQ process is closed on an e-Buy published RFQ. Lists quote information submitted by Contractors who weren't registered in ITSS at the time the RFQ was closed. Defaults to the primary region of GSA representative creating the COI
Requirements	File Attachments containing requirements for the order
RFI	Request For Information – Checking the 'Sources Sought' option on the BOMSOW for an RFQ being published in e-Buy delineates a RFI. Contractors will not be required to provide dollar amounts on their quote responses and a Market Analysis cannot be generated from the RFI once closed.
RFQ	Request For Quote - If RFQ is published in ITSS, then contractors will submit quotes in ITSS. If the RFQ is published in e-Buy then contractors will submit quotes in e-Buy.
Sources Sought	If 'Publish in e-Buy' on a BOMSOW is set to Yes, this option determines whether users would like it to be an RFI (Sources Sought = Yes) or RFQ (Sources Sought = No).
Surcharge	A type of GSA Fee where the client is charged a calculated percentage of the task item cost
Surcharge Amount	The calculated product of the cost of the task item times the task item surcharge rate
Surcharge Rate	A percentage used to calculate the GSA Fee if the type of fee for the task item is Surcharge
Task Item	A part of a task/delivery order. A task item has its own attributes and obligations.
Total quote \$	Sum of all Task Item Quote Amount values

# Order Document Privileges

Document	GSA User			Client			Contractors		
	Create	Edit	View	Create	Edit	View	Create	Edit	View
COI	✓	✓	✓			✓			✓ ❶
BOMSOW	✓	✓ ❷	✓			✓			✓ ❸
RFQ	✓	✓ ❹	✓			✓			✓ ❸
Quote	✓	✓	✓ ❺			✓ ❻	✓ ❼	✓ ❼	✓
Market Analysis	✓ ❸	✓	✓		✓ ❾	✓			
Directed Buy	✓ ❾	✓	✓			✓			✓ ❿
Notice of Award	✓	n/a	✓			✓			✓ ①

- ❶ Contractors may only view if they are on the BOMSOW Contractor List
- ❷ Limited edit privileges if RFQ is in open state in e-Buy
- ❸ Contractors may only view pre-award if on the BOMSOW Contractor List
- ❹ Limited edit privileges if RFQ in open state in e-Buy
- ❺ Can be limited to only GSA users in the region or listed on the COI
- ❻ Can limit Client to 'Show All', 'Show None' or 'Only Show Winner'
- ❼ Can create or edit during open non e-Buy RFQ period Only
- ❸ Cannot create Market Analysis if RFQ was an RFI from e-Buy
- ❾ Clients can edit if Market Analysis status is 'Pending Client Acceptance' otherwise they have read-only access
- ❾ Cannot create Directed Buy if 'Publish in e-Buy' field on BOMSOW set to 'Yes'
- ❿ Can only view Directed Buy if they are the first selected contractor on the BOMSOW
- ① Can only view Notice of Award if the Status is Signed

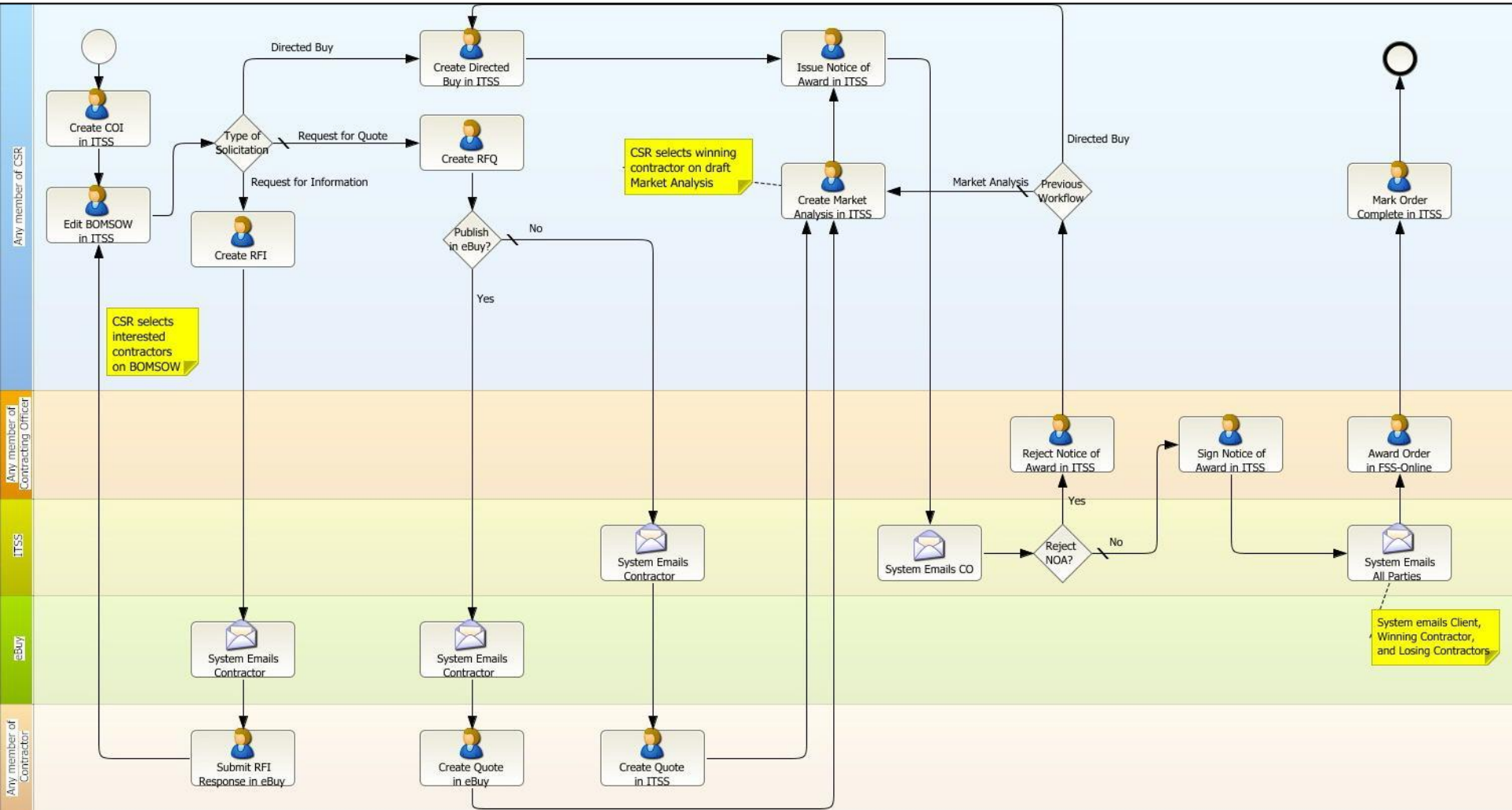
# Order Document Privileges, Cont'd

Document	GSA User			Client			Contractors		
	Create	Edit	View	Create	Edit	View	Create	Edit	View
Action Memo	✓	✓	✓	✓	✓ ❶	✓ ❶	✓	✓ ❶	✓ ❶
Memorandum	✓	✓	✓						
Resume Acceptance	✓	✓	✓				✓	✓	✓
Staffing Notice	✓	✓	✓				✓	✓	✓
Report	✓	✓	✓		✓	✓	✓	✓	✓
Customer Survey	✓	✓	✓						
Change Peers		✓	✓		✓	✓			
Change Alternates		✓	✓					✓	✓

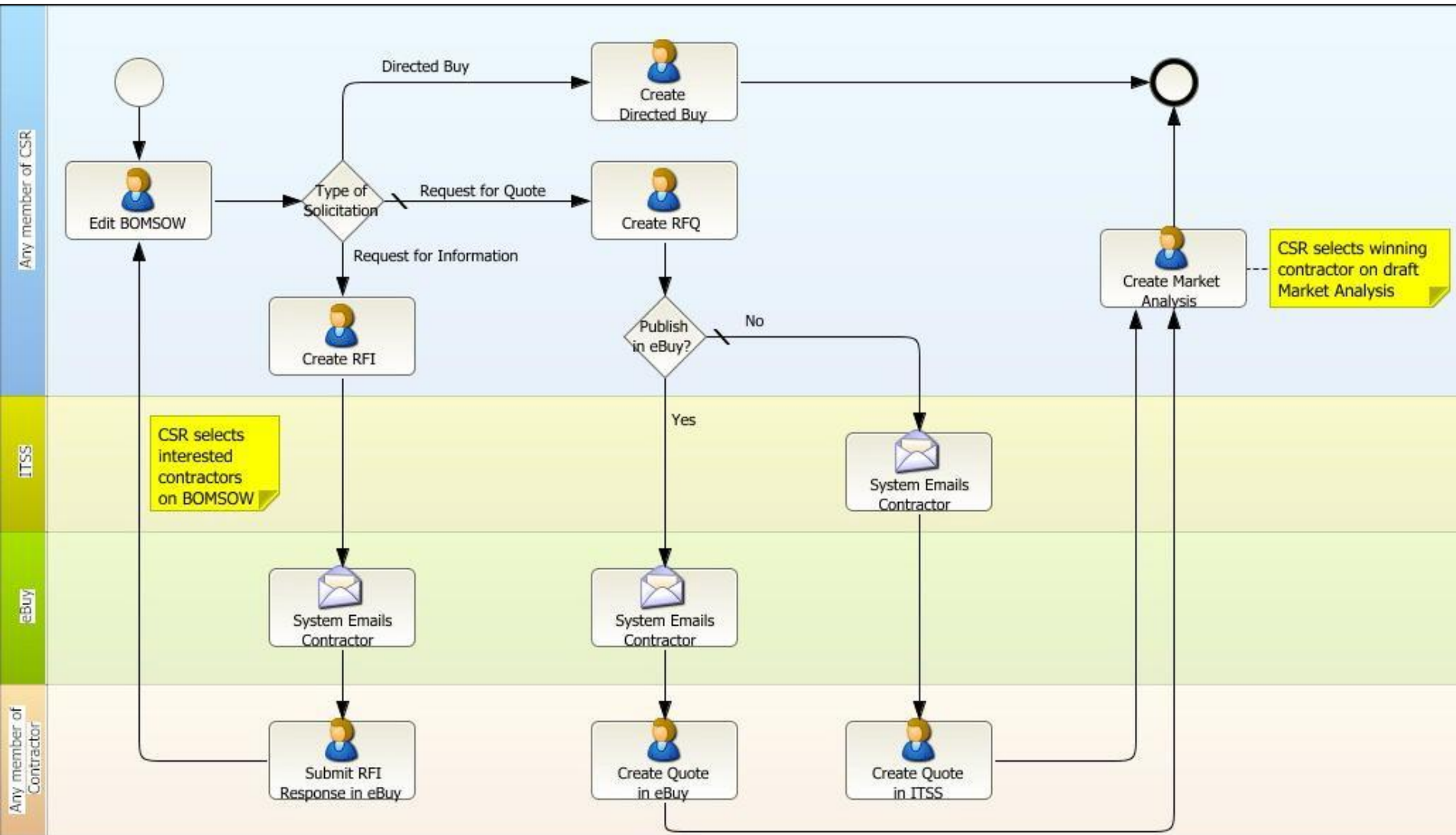
❶ If access granted on that document. Action Item access is granted on a per document basis.



# Within the Workflow Context

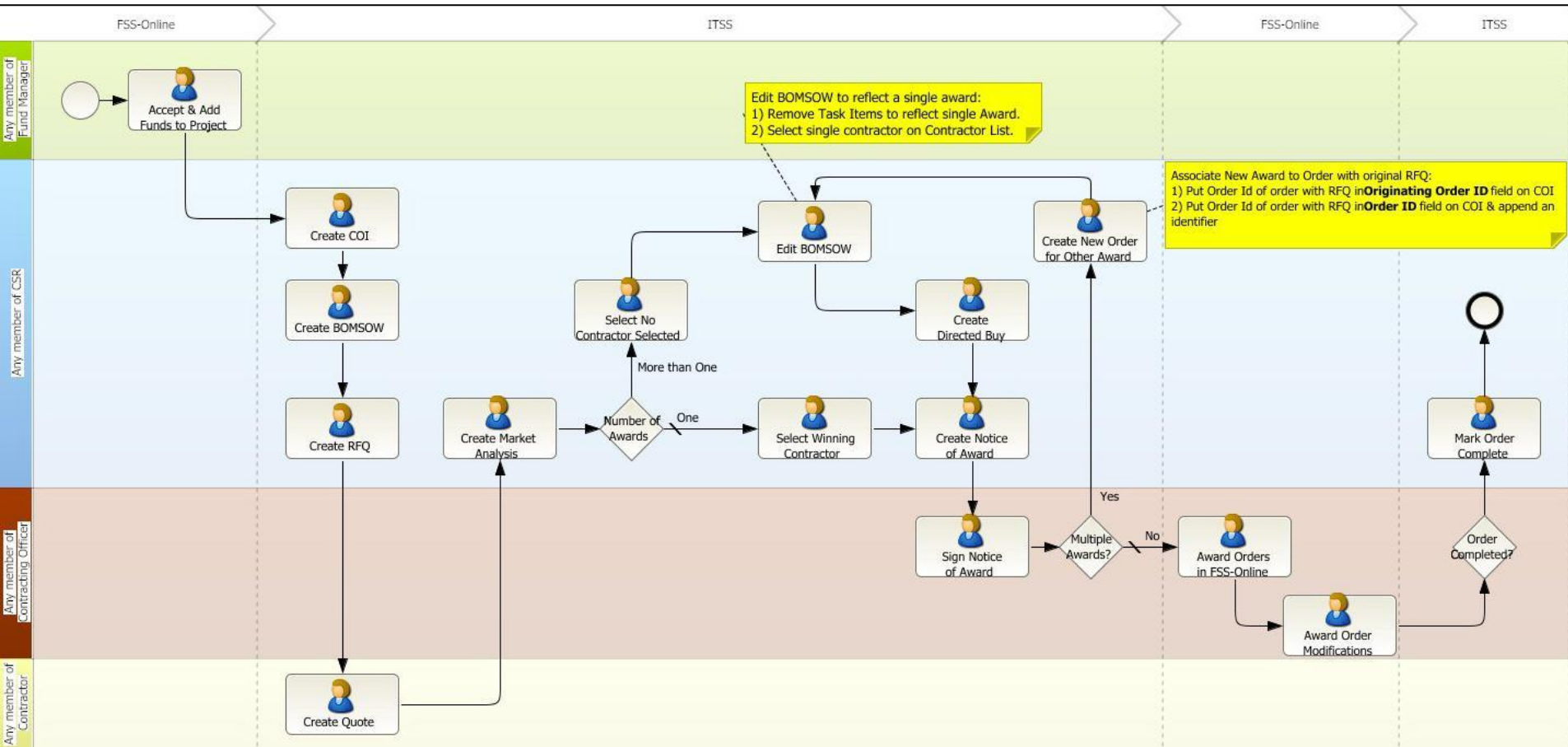


# Solicitation Workflow



The above workflow diagram describes the different routes available for the solicitation process in ITSS.

# Multiple Awards Workflow



The above workflow diagram describes the routes users should take for splitting an order into multiple awards amongst multiple contractors.

## Federal Acquisition Service

## Questions & Support

- For questions regarding IWAC Policy please contact [stephen.gervasi@gsa.gov](mailto:stephen.gervasi@gsa.gov)
- For questions regarding the IWAC training module please contact RBA Technical Support:
  - Phone: (877) 243-2889
  - Email: [helpdesk@gsarba.com](mailto:helpdesk@gsarba.com)

